Chapter 1

Requesting Training

Chapter Overview

Introduction

This chapter explains the processes related to requesting training in Oracle Training Administration (OTA). It guides you through the steps to complete the **Training Request Form** (TRF), route it to the **Civilian Inbox**, and send to the next approving official/office.

Chapter Contents

See Also

Module 7, Employee Training and Development Using the Modern DCPDS
- Overview
  - Stages of the Training Cycle
  - DoD Course Catalog
  - Course Training Type Codes
  - Bulletin Board
  - Continued Service Agreement (CSA)
  - Roles and Responsibilities

Chapter 2, Administering Training
- Processing OTA Actions in the Civilian Inbox
- Defining an Activity
- Scheduling an Event
- Creating a Local Supplier for a Local Activity

Chapter 4, Training Completions and Evaluations
- Recording Completed Training in HR

Continued on next page

Completing the Training Request Form

Purpose

This section will guide you through the process for completing the **Training Request Form (TRF)**.

Who Has Access

Components will determine the level of access to OTA.
Employees may submit their own **TRF** to their manager/supervisor if they have been granted access to OTA by their Component.

Before You Begin

- You must be in a Secure User view to access employee names to populate the TRF.
- If you are using an Activity (course) **<u>not</u>** listed in the DoD catalog, you must first build a local Supplier before you build the Activity. If you have already built the Supplier, this step is not necessary.
- Use the **TRF** to submit a request for enrollment in a Scheduled Event or to request training at a future date. The TRF is also the audit trail for approval of training. It may also be used as a survey tool.
  - Data in the **TRF** auto-populates some of the data fields in the DD Form 1556. The DD Form 1556 crosswalk in the Overview gives specific fields/blocks. A DD Form 1556 cannot be printed unless a TRF has been completed.
  - The **TRF** is available for individual requests only; however, you can easily make additional copies following the procedure in this chapter.
  - If you do not complete the **TRF**, you can send it to your Civilian Inbox and return to it at a later date.
  - A TRF is not required if you want to record employee’s self-development courses, or those completed at another agency.
  - OTA does not have a Routing List like the RPA. A specific name from the LOV must be selected for routing purposes.
  - Normally, the OTA Mngr/Sup or the OTA Org Trn Monitor will complete the TRF. In some cases, it will be completed in the personnel office if that office is centrally contracting or conducting the Event.

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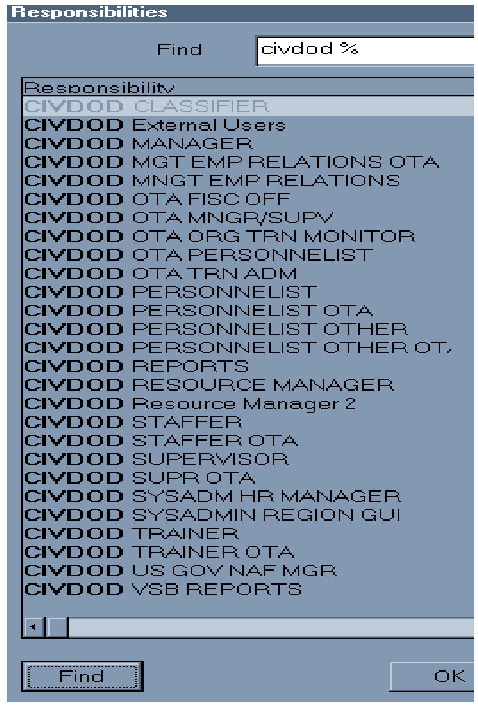
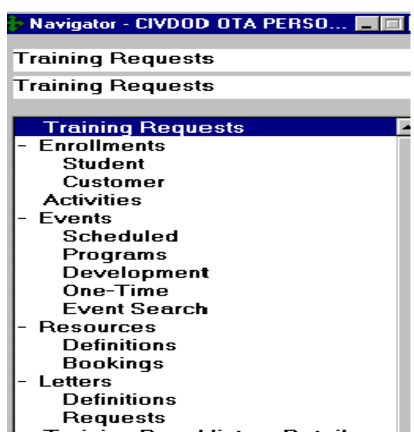
Completing the Training Request Form, Continued

Completing the Training Request Form

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click the responsibility that you have been assigned by your Component on the Responsibilities Window. Click <OK>.

</td></tr>
<tr><td>2</td><td>The Navigation List displays. Click Training Requests and click <Open>.

</td></tr>
</table>

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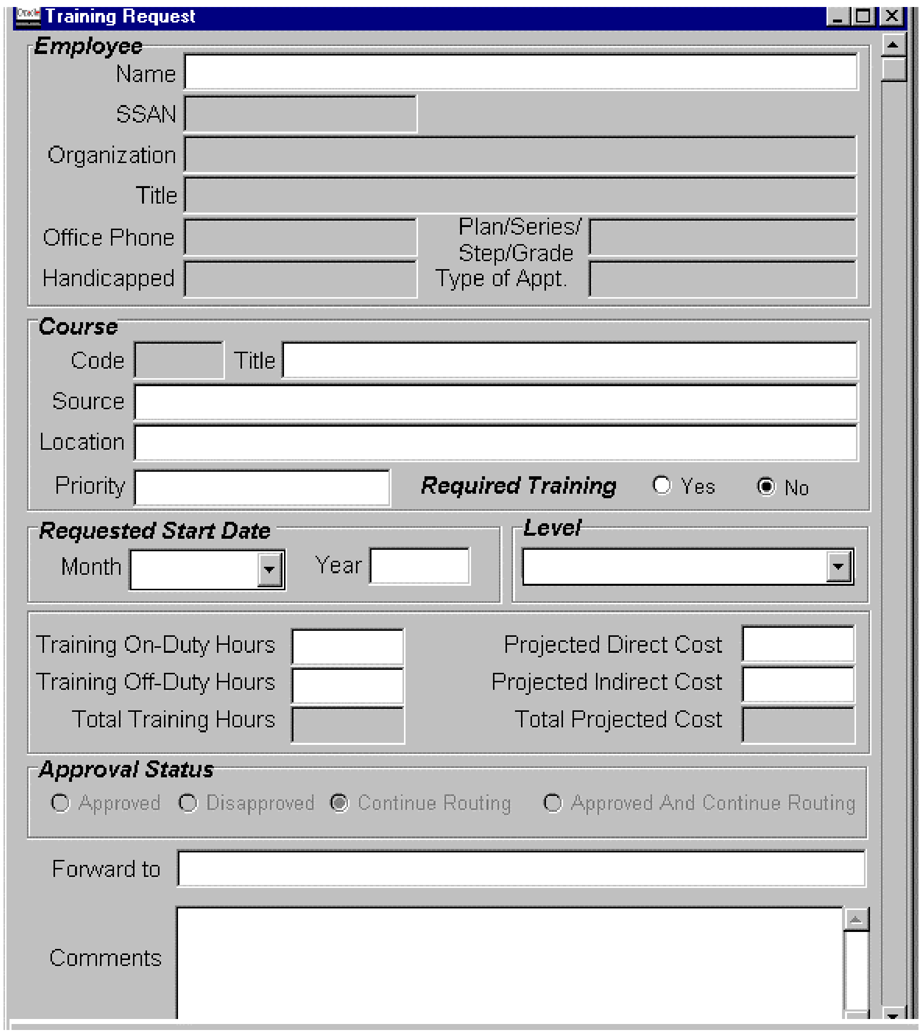
Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
3	The **Training Request Form** Window displays.



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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click your cursor in each of the following data fields to complete the TRF:
<table>
<tr><th>Data Field/Region</th><th>Description/Action</th></tr>
<tr><td>Employee Region:</td><td></td></tr>
<tr><td>Name</td><td>Type either using mixed case or use the LOV on the Toolbar.
SSAN, Organization, and the remainder of the Employee Region auto-populates from the HR database.
Note: You must be in a Secure User view to access names in the LOV. The Secure User view allows selection of any employee whom you supervise, or service if you are in HR and responsible for generating TRFs, but not other employees in the database. Secure User views are set up through your System Administrator. See Module 1, Fundamentals of the Modern DCPDS, Chapter 2, Logging On and Access.</td></tr>
<tr><td>Course Region:</td><td></td></tr>
<tr><td>Code</td><td>Populates when a Title is selected.</td></tr>
<tr><td>Title</td><td>Use the LOV to select from the DoD Course Catalog or type in a title. If you know part of a title, you can query in the Title Field. Type in the partial title (e.g., %logistics%, press the Enter key, and the LOV that contains courses with “logistics” in the title displays. This field is not case sensitive.</td></tr>
</table>
</td></tr>
</table>

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

Step	Action
4 (cont)	

Data Field/Region	Description/Action
Course Region: (cont)	
Source	Click the LOV to select or type in the code (e.g., G for National Guard, 4 for Private Vendor, etc).
Location	Click the LOV to select the location or type in the first few letters of the location and press the Enter key.
Priority	Type the number 1,2,3,0, 9 (unknown) or use the LOV.
Required Training	Click the radio button for Yes or No. You should also update the HR Required Training if this is one of your Component's business rules.
Requested Start Date Region	
Month	Use the drop down menu to select a month the Activity (course) will be taught, if known. Otherwise, select a month when the employee is available to attend.
Year	Type in the four-digit year when the Activity is requested.
Level	Select level of person submitting the TRF from the drop-down menu; e.g., Supervisor, Training Monitor.
Training On-Duty Hours	Type in the total duty hours. Press the [**Tab**] key.
Training Off-Duty Hours	Type in total off-duty hours. Press the [**Tab**] key.

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(cont)</td><td>
<table>
<tr><th>Data Field/Region</th><th>Description/Action</th></tr>
<tr><td>Course Region: (cont)</td><td></td></tr>
<tr><td>Total Training Hours</td><td>The Total Training Hours automatically populates.</td></tr>
<tr><td>Projected Direct Cost</td><td>Type in Projected Direct Cost (tuition and fees). Press the [Tab] key.</td></tr>
<tr><td>Projected Indirect Cost</td><td>Type in Projected Indirect Cost (travel and per diem). Press the [Tab] key.</td></tr>
<tr><td>Total Projected Cost</td><td>The Total Projected Cost auto-populates.</td></tr>
<tr><td>Approval Status Region:</td><td></td></tr>
<tr><td></td><td>Click the button that is appropriate for your role; e.g., supervisor.
Note: An employee can only Continue Routing a TRF. All selections to which you do not have access will be grayed out.</td></tr>
<tr><td>Approved</td><td>Selection of this button stops the workflow process. The TRF can be sent back to the requestor, but no further processing occurs. Typically, only the person completing the enrollment should click on this action. Components can determine their specific policy.</td></tr>
</table>
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</td></tr>
</table>

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Completing the Training Request Form, Continued

Completing the Training Request Form (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
(cont)</td><td>
<table>
<tr><th>Approval Status Region: (cont)</th><th></th></tr>
<tr><td>Continue Routing</td><td>Selection of this button allows the TRF to be changed or to be routed. As long as no approvals are given, changes may be made to the TRF.</td></tr>
<tr><td>Approved and Continue Routing</td><td>Selection of this button documents an approval level but does not stop the workflow process. A notification will flow to the requestor that the TRF is approved. No changes may be made to the TRF after this button is clicked.</td></tr>
<tr><td>Forward to</td><td>Click the LOV to select name.</td></tr>
<tr><td>Comments</td><td>Type in comments up to 4 lines</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Click Save on the Toolbar. TRF will go to inbox of person “Forwarded To.” This completes the supervisor’s required input. The Message Bar at the bottom of the window will indicate the status of the TRF, “Transaction complete. 1 records applied and saved.”</td></tr>
<tr><td>6</td><td>Continue routing TRF until all approvals are received.</td></tr>
</table>

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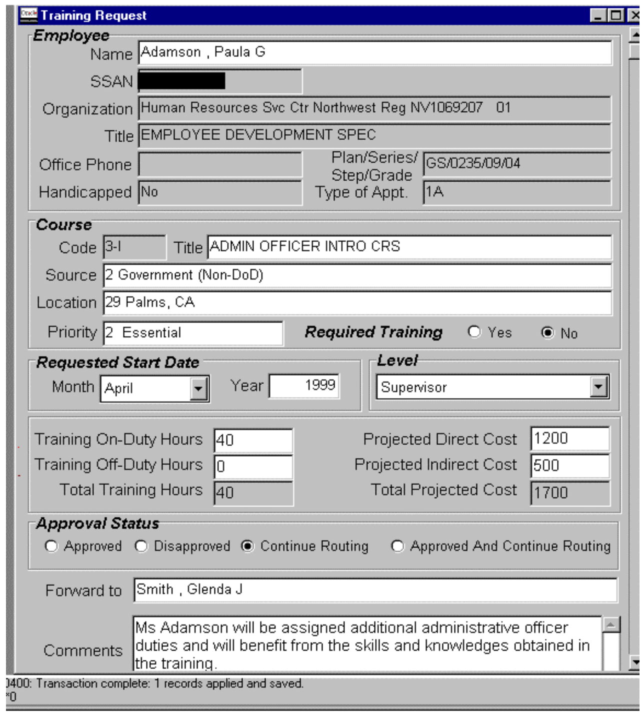
Completing the Training Request Form, Continued

Completing the Training Request Form(continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6
(cont)</td><td>♦ Example of completed TRF:

Training Request
Employee
Name Adamson , Paula G
SSAN [redacted]
Organization Human Resources Svc Ctr Northwest Reg NV1069207 01
Title EMPLOYEE DEVELOPMENT SPEC
Office Phone
Plan/Series/ Step/Grade GS/0235/09/04
Handicapped No
Type of Appt. 1A
Course
Code 3-I Title ADMIN OFFICER INTRO CRS
Source 2 Government (Non-DoD)
Location 29 Palms, CA
Priority 2 Essential Required Training ○ Yes ◉ No
Requested Start Date
Month April Year 1999
Level
Supervisor
Training On-Duty Hours 40 Projected Direct Cost 1200
Training Off-Duty Hours 0 Projected Indirect Cost 500
Total Training Hours 40 Total Projected Cost 1700
Approval Status
○ Approved ○ Disapproved ◉ Continue Routing ○ Approved And Continue Routing
Forward to Smith , Glenda J
Comments Ms Adamson will be assigned additional administrative officer duties and will benefit from the skills and knowledges obtained in the training.
0400: Transaction complete: 1 records applied and saved.</td></tr>
<tr><td>7</td><td>The TRF is forwarded to the Civilian Inbox of the person designated in the Forward to of the window.</td></tr>
</table>

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Printing the Training Request Form

Printing the TRF

Step	Action
1	To print the **TRF**, click **<u>A</u>ction** on the Main Menu Bar and click **<u>P</u>rint**. 
2	A **Print Setup** Window displays. • Enter any necessary information on the **Print Setup** Window, such as printer, size of the image, orientation, and click **<OK>**. • A second **Print Setup** Window displays. Select any necessary information, such as number of copies, and click **<OK>**.
3	The **Forms** Window displays, informing you the print capture is beginning and not to move or occlude the window you want to print. Click **<OK>**.
4	A second forms window displays to confirm the image capture is complete. Click **<OK>** and retrieve the page from your printer. **Note:** Use this same process to print any window in this application. See Chapter 6, Reports, in this module for additional instructions.
5	Exit the window and return to the **Navigation List**.

Completing Additional Training Request Forms

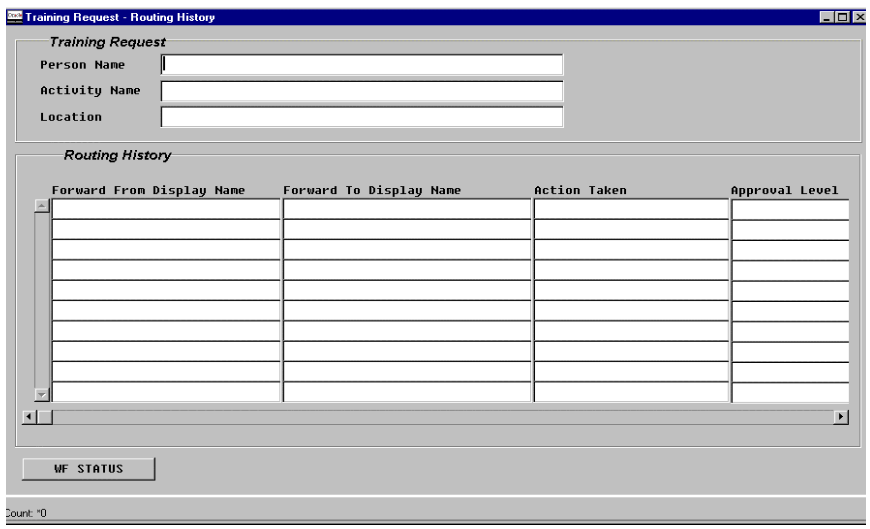
Completing Additional Training Request Forms

Follow this procedure with the TRF open that you wish to copy and add new names or if you wish to use the same name and add new course titles:

Step	Action
1	Select new record on the Toolbar.
2	A blank **Training Request Form** displays.
3	With your cursor in the ***Name*** data field, select the employee name from LOV. The remaining data in the **Employee** Region automatically populates.
4	If the course title is the same as the previous TRF, place your cursor in the ***Title*** data field and press [F3]. This duplicates the previous entry. Continue positioning your cursor in each data field, and pressing [F3] until the form is completed. If desired training is not the same as the previous **TRF**, each data field must be completed separately.
5	Complete the Approval Status Region following the steps in this chapter.
6	Save the action and exit the window.

Viewing Training Request Form Routing History

Viewing the Routing History

Step	Action
1	On the **Navigation List** → *Training Req. History Details* → **<Open>**.
2	The **Training Request Routing History** Window displays. With your cursor in the ***Person Name*** data field, press F7 or **Query** → **Enter** on the Main Menu Bar, type in the employee name or the first few letters of the last name, type the % sign, and press F8 or **Query** → **Run**. A similar query can be done in the ***Activity Name*** and ***Location*** data fields. 
3	The window displays with the routing history of the TRF. The remaining column, not shown, is the Date Notification Sent. If more than one record exists for your query, (e.g., more than one TRF exists for a specific activity), click the down arrow key to display the next record.

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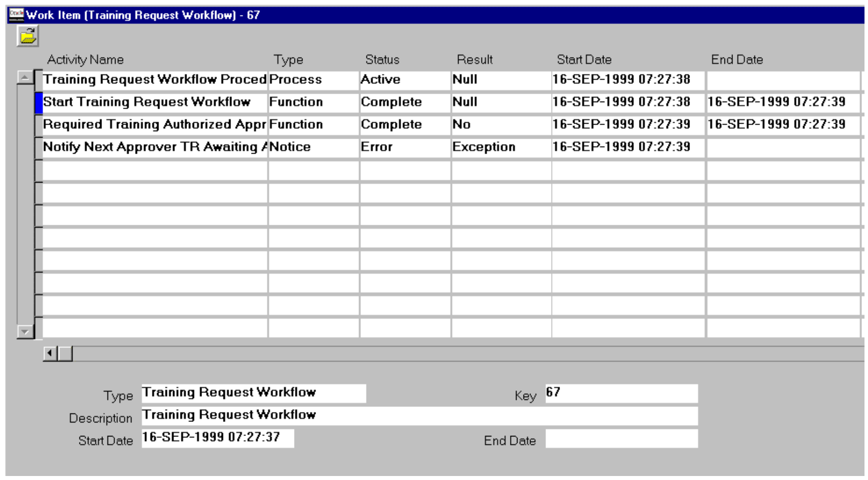
Viewing Training Request Form Routing History, Continued

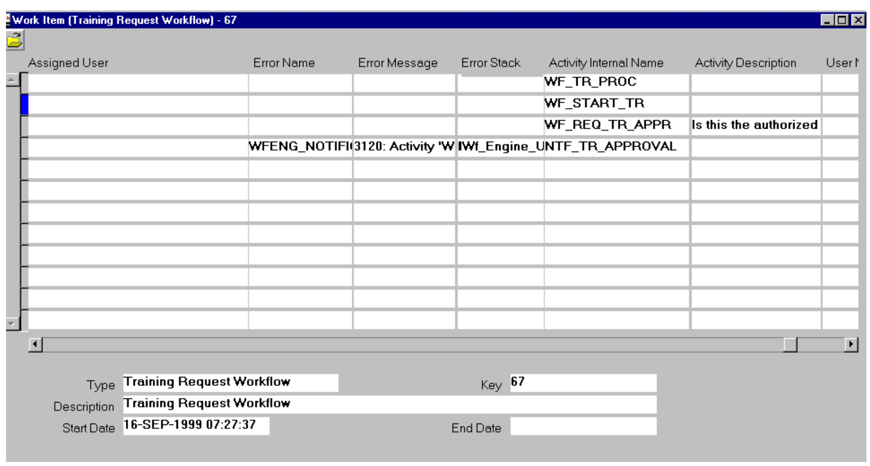
Viewing the Routing History (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Click **<WF STATUS>**. The **Work Item (Training Request Workflow)** Window displays. As the button indicates, this gives you the status of your workflow processes.



Use the bottom scroll button to view the second half of window:



</td></tr>
</table>

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